

Performance Management Employee Appraiser Program

Additional Helpful Hints

Employee Folder

- By adding in the information into the Employee Folder, the data will automatically populate the actual appraisal.
- If the name, title, etc. have an underline in the final appraisal document, it means the information was manually entered and the supervisor has not added the employee information into the Employee Folder.
- When customizing fields, there are a multitude to choose from including probationary date, rehire date, hourly rate, and date of last increase, just to name a few. There are also several fields that can be defined by the user.
- You also have the capability of changing the date and description of any of the 'notes' in the Employee Folder. It may be a week between when the action occurred and when you have the opportunity to enter it into the Employee Folder. Also, by changing the "Note" to a particular topic, it makes it easier to sort and place in the appraisal. Use "Document Information" to change the date and description of a 'note'.

Creating an Evaluation

- Verify employee information
 - If the Employee folder is up to date, the data should be accurate
 - The program will automatically default to "3rd person".
 - Instructions have been made available to insert the State's template into the list of available templates. Check with your HR or IT people. If the template does not appear in the list, use the "Browse" to find the correct directory and folder where it is located, select default, and "OK".

The Writing Assistant

- Each Performance Standard and each performance level will have multiple categories to choose from. For example: Dependability can address the employee getting the job done on time, as well as address the employee's attendance. You may select as many categories as needed and you may even find that they are performing well in some categories and less than desirable in another category – all within the same performance standard.

Placing Text

- Whether you are placing information into the appraisal from the Writing Assistant or one of the other available tools, remember to place your cursor where you want the information added.
- Once the information is added to the appraisal, it can be modified as you would a word document.

Development Coach

- The Development coach has suggestions for both the achieving employee as well as those with less than desirable performance.
- The “Manager” and “Employee” buttons toggle from suggestions for the employee and suggestions for the manager to help the employee.
- Not all suggestions may be applicable. You can either copy the suggestions you like and place them in the appraisal, or place the entire list of suggestions and then delete or edit those from the appraisal that are not applicable.
- You may choose to use the suggestions in the text addressing the specific performance standard or you may wish to have the suggestions as part of the overall appraisal summary.

Job Coach

- The job coach provides suggestions you can provide the employee in developing skills or body of knowledge.
- For example, **Personal Work Standards**
 - Develop and use a personal time management system to organize your activities and use your time efficiently.
 - Regularly establish and achieve goals for yourself around particular projects, and for personal productivity and development.
 - From time to time review your personal work standards. Identify your strengths and areas for improvement. Set new goals to improve your standards.
 - Regularly go the "extra mile" to produce extraordinary work.

Additional Performance Standards

- When adding an additional performance standard, you have the ability to modify the description as needed for your agency.

Summary

- The Summary should be written in such a fashion that anyone can read just that section and clearly identify the level of performance of the employee.
- This may require repeating items listed previously in the performance standards.

Manager’s Resource Center

- Performance Objectives:
 - Provides assistance in writing objectives, recording results, and sample objectives.
 - Double click on the folder on the right hand side to open the folder and view the available assistance in the specific category
- Employee Recognition
 - This is a quick little suggestion guide to recognize the individual performing as well as the team.

- Coaching Memos
 - Coaching memos help you provide guidance and coaching to your employee when giving them a new assignment, when performance slips, and in restating objectives.
 - Could be used as part of a Performance Improvement Plan.
- Development Plans
 - This section contains two types of development plans. The Performance Development Plan is used for near-term improvement in one to three performance areas. The Career Development Plan is used to focus an individual's work experience and training on long-term organizational needs and personal interests.
- Corrective Action
 - The Checklist on when to take corrective action is excellent in helping you identify when corrective action is necessary versus additional training.
 - The Verbal warning folder walks the supervisor through preparing the warning and properly documenting the warning.
 - Please ensure your HR staff is involved when dealing with written and beyond corrective actions as this program does not address Due Process, as required by Idaho Code and the Division of Human Resources.

Saving Your Appraisal

- Some agencies have the appraisals saved on the supervisor's hard drive while others have developed a secure folder on the network.
- Check with your IT or HR staff to ensure your appraisal is properly saved and backed up.

Additional aspects of the Employee Appraiser

Insert Custom Topic

- The tutorial walked you through inserting an additional topic, but there is also the option of inserting a custom topic.
- The title and text of the topic is blank, thus allowing you to address specific standards for your agency.
- To use this option, select "Insert", and the "Custom Topic".

Document Reminders:

- This function provides a reminder of when appraisals are due each time you open the program.
- You can select all your employees to receive reminders on or just one or two.
- You can select or deselect as often as you wish.
- This reminder occurs only when you open the program. It does send an email or otherwise notify you.

Passwords

- You have the ability to password protect your appraisal documents.
- Select “Tools”, “Options” and click on “Password”.
- You will be given the ability to set the password.
- **Important Warning:** Your IT group does not maintain or issue the passwords. Should you forget the password, the document can not be opened.
- If you use a password, write down the password and put in a secure place where you can access it later, should you forget the password

Opening More than One Appraisal

- You may open more than one appraisal at a time.
- This is a handy feature that allows you to refer to an employee’s prior evaluation while preparing the current evaluation.
- To toggle between the two or more open appraisals, use the “Window” button on the top command line.